



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org



London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DATE: WEDNESDAY, APRIL 7 2021

SUBJECT: GRANT RENEWAL: **COVIA & LIGHTHOUSE FOR THE BLIND AND VISUALLY IMPAIRED (NON-PROFIT)** TO PROVIDE THE VOLUNTEER VISITOR PROGRAM

DS
EE

	Current	Renewal	Contingency	Total	
GRANT TERM:	1/1/19- 6/30/21	7/1/21- 6/30/23			
GRANT AMOUNT:	\$260,387	\$178,574	\$17,857	\$196,431	
ANNUAL AMOUNT:	FY21/22 \$89,287	FY22/23 \$89,287			
FUNDING SOURCE:	County	State	Federal	Contingency	Total
FUNDING:	\$178,574			\$17,857	\$196,431
PERCENTAGE:	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to renew the grant with multiple vendors for the period of July 1, 2021 to June 30, 2023, in an amount of \$178,574, plus a 10% contingency for a total amount not to exceed \$196,431. The purpose of each grant is to provide a volunteer visitor program that will match volunteer visitors with older adults and/or adults with disabilities living in the City and County of San Francisco who may be isolated or at



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heightened risk of isolation. The funding amounts are detailed in the following table:

Grantee	Annually for 2 years¹ Total	Contingency (10%)	Not to exceed
LightHouse for the Blind and Visually Impaired	\$22,337 \$44,674	\$4,467	\$49,141
Covia Foundation	\$66,950 \$133,900	\$13,390	\$147,290
Total	\$89,287 \$178,574	\$17,857	\$196,431

¹ 7/1/2021 – 6/30/2022, 7/1/2022 – 6/30/2023

Background

City and County of San Francisco voters passed Proposition I on November 8, 2016. Proposition I established the Dignity Fund (Fund). The Dignity Fund is a guaranteed funding stream for programs and services that provide support for older adults and adults with disabilities. The Department of Disability and Aging Services (DAS) administers the Dignity Fund.

There is an Oversight and Advisory Committee (OAC) for the Fund. DAS and the OAC are responsible for a fair and equitable allocation of the Fund. The administration of the Fund includes a planning process that began in FY 17/18 and repeats every fourth fiscal year. The planning process starts with a Dignity Fund Community Needs Assessment (DFCNA). The FY 17/18 DFCNA was completed and the Board of Supervisors approved the DFCNA report in June of 2018. The findings from each DFCNA help inform an allocation plan for the expenditure of the Fund.

In FY 18/19 the City added \$3 million dollars to the annual baseline contribution. Using the DFCNA as a guide and in consultation with the OAC, DAS developed a FY 18/19 allocation plan for the expenditure of the \$3 million dollars added to the fund.

The allocation plan for the additional \$3 million in FY 18/19 includes an initiative to mitigate social isolation by providing a volunteer visitor program. DAS recognizes and the DFCNA report reinforces that social isolation is a serious concern for older adults and adults with disabilities in San Francisco. Consumers who responded to the population survey



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conducted for the DFCNA echoed the concern to prevent social isolation. The DFCNA highlighted the need to continue providing programming that creates opportunities for older adults and adults with disabilities to socialize and reduce social isolation.

Social isolation was also one of the five equity factors considered in DFCNA. Volunteer visitor programs will not only help to mitigate social isolation, they align with a key priority for DAS, which is to address equity factors in service delivery.

Services to be Provided

The grantees will provide volunteer visitor programs that match and connect a volunteer with an older adult and/or adult with a disability who has enrolled in grantees' volunteer visitor program. The matching process implemented by the grantees will take into account the interests and needs of the older adult and/or adult with a disability to promote a successful pairing and relationship building. Volunteer visits will be scheduled on a regular basis with consideration given to the availability of both the older adult and/or adult with a disability and the volunteer visitor. Visits will be at a mutually agreed upon time and if somewhere other than the home of the older adult and/or adult with a disability, at a mutually agreed upon place. The volunteer visitor will visit the older adult or adult with a disability enrolled in the program that they connect with at least twice per month and each visit will be at least one hour in duration. The grantees will recruit, screen and train volunteer visitors. A minimum of a six-month commitment by the volunteer visitor is required.

Please refer to attached Appendices A and B for each Grantee for more detailed information regarding service objectives, outcome objectives, and budget.



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Selection

Grantees were selected through Request for Proposals #821, which was competitively bid in October 2018.

Funding

Volunteer Visitor Program grants will be funded through the Dignity Fund

ATTACHMENTS

Covia Foundation

Appendix A1 - Services to be Provided

Appendix B - Budget

LightHouse for the Blind and Visually Impaired

Appendix A1 - Services to be Provided

Appendix B - Budget

**Appendix A1 – Services to be Provided
Covia Foundation
Volunteer Visitor Program
July 1, 2021 – June 30, 2023**

I. Purpose of Grant

The purpose of this grant is to provide a visitor program that will match volunteers with older adults and/or adults with disabilities living in the City and County of San Francisco who may be socially isolated or at heightened risk of isolation.

II. Definitions

Adult Protective Services (APS)	The unit within DAS that accepts and responds to reports of abuse, neglect, exploitation, and self-neglect involving older adults and adults with disabilities.
Adult with a Disability	A person 18 to 59 years of age living with a disability.
CA.GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing Online System.
City	City and County of San Francisco, a municipal corporation.
Client Participant	An older adult or adult with a disability participating in the Volunteer Visitor Program and reflected in CA.GetCare through program enrollment; used interchangeably with “unduplicated consumer.”
Communities of Color	Persons who identify with a race or ethnicity other than non-Hispanic White.
Controller	Controllers of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services of the San Francisco Human Services Agency.
DAS Integrated Intake and Referral Unit	A unit within DAS that is equipped to receive calls from the community and provide information, referrals, and assistance for older adults and adults with disabilities, caregivers, and community-based organizations.
Dignity Fund (Fund)	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities.
Dignity Fund Community Needs	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The

Assessment (DFCNA)	findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The first DFCNA was completed in fiscal year 2017-2018.
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Grantee	Covia Foundation
LGBT/LGBTQ	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OAC	Oversight and Advisory Committee
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years of age or older; used interchangeably with “senior.”
Senior	Person who is 60 years of age or older; used interchangeably with “older adult.”
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Three Item UCLA Loneliness Scale	A scale comprised of three questions that measures three dimensions of loneliness. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the Volunteer Visitor Program and reflected in CA.GetCare through program enrollment; used interchangeably with “client participant.”

Volunteer Visitor	An adult volunteer screened and trained by the grantee to provide in person visits to an older adult and/or adult with disability enrolled in the Volunteer Visitor Program.
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III. Target Population

Older adults and/or adults with disabilities living in the City and County of San Francisco who are socially isolated or at heightened risk of isolation. Additional target priorities include members of a population with one or more of the other equity factors identified in the DFCNA:

- Low Income
- Limited or No English Speaking Proficiency
- Communities of Color
- Sexual Orientation and Gender Identity

IV. Eligibility for Program Enrollment

1. A resident of San Francisco; and
2. A person who is an older adult or an adult with a disability

V. Description of Services

1. Grantee will provide the Volunteer Visitor Program for older adults and/or adults with disabilities living in the City and County of San Francisco who may be socially isolated or at heightened risk of isolation. The program will connect an older adult or adult with a disability, hereinafter also known as client participant, to an adult volunteer.
2. A client participant will receive connection to social engagement or other resources at least twice per month, including but not limited to, in-person, phone or video visits, personal correspondence, or information & referral.
3. Grantee will connect client participants with volunteer visitors through a matching process. The policy and procedures for the matching process conducted by the grantee will promote successful pairings and relationship building. A minimum of a six-month commitment by the volunteer visitor is required.
4. Grantee will have written guidelines and expectations for both the client participant and volunteer visitor.
5. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable, including the number of visits provided to client participants by volunteer visitors.
6. Grantee will conduct outreach for its Volunteer Visitor Program aimed at reaching the target population and at recruiting volunteer visitors.

7. Grantee will recruit, screen, and train volunteer visitors. The screening process for volunteer visitors will include, but is not limited to, a background check for all volunteer visitors.
8. Grantee will ensure the volunteer training is comprehensive and includes, but is not limited to, how to report suspected abuse or self-neglect to APS, an overview of the services available at DAS Intake and Referral Unit, and the general role the unit has in serving older adults and adults with disabilities. Training must be provided before a volunteer begins visiting a client participant.
9. Grantee will have readily available resources that volunteers can access as needed to help and support them in their role as a volunteer visitor.
10. Grantee will conduct an in-home or phone assessments of the client participant prior to connecting a client participant with a volunteer visitor to confirm that the visitor program is an appropriate service and to ensure the safety of both the client participate and volunteer visitor.
11. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all client participants enrolled in the Volunteer Visitor Program.
12. Grantee shall ensure adequate and culturally competent paid and volunteer staffing to administer the program, deliver quality services to meet the needs of the client participants, and adhere to all DAS program standards.
13. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
14. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAS policy memoranda manual.

VI. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VII. Service Objectives

On an annual basis, Grantee will meet the following Service Objectives as detailed in Table A below:

TABLE A	
Service Objective Summary Table	
The number of client participants/unduplicated consumers enrolled	55
The number volunteer visitors, recruited, screened, and trained	57
The number of volunteer visitors connected to client participants	55
The number of visits provided to client participants by volunteer visitors	1320
75% or more of the client participants will participate in the Volunteer Visitor Program for six months or more.	

VIII. Outcome Objectives

On an annual basis, Grantee will meet the following Outcome Objectives:

1. At least 75% of the surveyed client participants will report that participation in the volunteer visitor program has supported them to develop a meaningful relationship or friendship.*
2. At least 75% of the surveyed client participants will report that participation in the Volunteer Visitor Program has decreased feelings of loneliness.*
3. At least 75% of participants will report enhanced feelings of connection through opportunities presented through/by the program.*

**Based on a survey created by the grantee with input from DAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAS provided or DAS approved intake form into the CA GetCare database in accordance to DAS policy.
3. Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
 - Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAS by March 15 each grant year or a mutually agreed upon date between DAS and the Grantee.
8. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA. The due dates for submitting the bi-annual

summary reports are January 10th (July 1st through December 31st data) and July 10th (January 1st through June 30th data).

9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAS.

For assistance with reporting requirements or submission of reports, contact:

Tahir.Shaikh@sfgov.org
Contract Manager, Office of Contract Management

or

Hanna.Teferi@sfgov.org
Administrative Analyst, Office of Community Partnerships

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on CA.GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the elder abuse reporting, evidence that program staff have completed security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and IX.
2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**Appendix A1 – Services to be Provided
LightHouse for the Blind and Visually Impaired
Volunteer Visitor Program
July 1, 2021 – June 30, 2023**

I. Purpose of Grant

The purpose of this grant is to provide a visitor program that will match volunteers with older adults and/or adults with disabilities living in the City and County of San Francisco who may be socially isolated or at heightened risk of isolation.

II. Definitions

Adult Protective Services (APS)	The unit within DAS that accepts and responds to reports of abuse, neglect, exploitation, and self-neglect involving older adults and adults with disabilities.
Adult with a Disability	A person 18 to 59 years of age living with a disability.
CA.GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing Online System.
City	City and County of San Francisco, a municipal corporation.
Client Participant	An older adult or adult with a disability participating in the Volunteer Visitor Program and reflected in CA.GetCare through program enrollment; used interchangeably with “unduplicated consumer.”
Communities of Color	Persons who identify with a race or ethnicity other than non-Hispanic White.
Controller	Controllers of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services of the San Francisco Human Services Agency.
DAS Integrated Intake and Referral Unit	A unit within DAS that is equipped to receive calls from the community and provide information, referrals, and assistance for older adults and adults with disabilities, caregivers, and community-based organizations.
Dignity Fund (Fund)	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities.
Dignity Fund Community Needs	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The

Assessment (DFCNA)	findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The first DFCNA was completed in fiscal year 2017-2018.
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Grantee	LightHouse for the Blind and Visually Impaired
LGBT/LGBTQ	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OAC	Oversight and Advisory Committee
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years of age or older; used interchangeably with “senior.”
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Three Item UCLA Loneliness Scale	A scale comprised of three questions that measures three dimensions of loneliness. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the Volunteer Visitor Program and reflected in CA.GetCare through program enrollment; used interchangeably with “client participant.”

Volunteer Visitor	An adult volunteer screened and trained by the grantee to provide in person visits to an older adult and/or adult with disability enrolled in the Volunteer Visitor Program.
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III. Target Population

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- Low Income
- Limited or No English Speaking Proficiency
- Communities of Color
- Sexual Orientation and Gender Identity

IV. Eligibility for Program Enrollment

1. A resident of San Francisco; and
2. A person who is an older adult or an adult with a disability.

V. Description of Services

1. Grantee will provide the Volunteer Visitor Program for older adults and/or adults with disabilities living in the City and County of San Francisco who may be socially isolated or at heightened risk of isolation. The program will connect an older adult or adult with a disability, hereinafter also known as client participant, to an adult volunteer.
2. A client participant will receive connection to social engagement or other resources at least twice per month, including but not limited to, in-person, phone or video visits, personal correspondence, or information & referral.
3. Grantee will connect client participants with volunteer visitors through a matching process. The policy and procedures for the matching process conducted by the grantee will promote successful pairings and relationship building. A minimum of a six-month commitment by the volunteer visitor is required.
4. Grantee will have written guidelines and expectations for both the client participant and volunteer visitor.
5. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable, including the number of visits provided to client participants by volunteer visitors.
6. Grantee will conduct outreach for its Volunteer Visitor Program aimed at reaching the target population and at recruiting volunteer visitors.
7. Grantee will recruit, screen, and train volunteer visitors. The screening process for volunteer visitors will include, but is not limited to, a background check for all volunteer visitors.

8. Grantee will ensure the volunteer training is comprehensive and includes, but is not limited to, how to report suspected abuse or self-neglect to APS, an overview of the services available at DAS Intake and Referral Unit, and the general role the unit has in serving older adults and adults with disabilities. Training must be provided before a volunteer begins visiting a client participant.
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11. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all client participants enrolled in the Volunteer Visitor Program.
12. Grantee shall ensure adequate and culturally competent paid and volunteer staffing to administer the program, deliver quality services to meet the needs of the client participants, and adhere to all DAS program standards.
13. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
14. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAS policy memoranda manual.

VI. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VII. Service Objectives

On an annual basis, Grantee will meet the following Service Objectives for the Volunteer Visitor Program detailed in Table A below:

TABLE A	
Service Objective Summary Table	
The number of client participants/unduplicated consumers enrolled	29
The number volunteer visitors, recruited, screened, and trained	30
The number of volunteer visitors connected to client participants	29
The number of visits provided to client participants by volunteer visitors	630
75% or more of the client participants will participate in the Volunteer Visitor Program for six months or more.	

VIII. Outcome Objectives

On an annual basis, Grantee will meet the following Outcome Objectives:

1. At least 75% of the surveyed client participants will report that participation in the volunteer visitor program has supported them to develop a meaningful relationship or friendship.*
2. At least 75% of the surveyed client participants will report that participation in the Volunteer Visitor Program has decreased feelings of loneliness.*
3. At least 75% of participants will report enhanced feelings of connection through opportunities presented through/by the program.*

**Based on a survey created by the grantee with input from DAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAS provided or DAS approved intake form into the CA GetCare database in accordance to DAS policy.
3. Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
 - Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAS by March 15 each grant year or a mutually agreed upon date between DAS and the Grantee.
8. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA. The due dates for submitting the bi-annual

summary reports are January 10th (July 1st through December 31st data) and July 10th (January 1st through June 30th data).

9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAS.

For assistance with reporting requirements or submission of reports, contact:

Patrick.Garcia@sfgov.org
Contract Manager, Office of Contract Management

or

Hanna.Teferi@sfgov.org
Administrative Analyst, Office of Community Partnerships

X. Monitoring Activities

1. **Program Monitoring:** Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on CA GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the elder abuse reporting, evidence that program staff have completed security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and IX.
2. **Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Term	
6	COVIA Foundation		7/1/21-6/30/23	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Volunteer Visitor Program			
10	Budget Reference Page No.(s)			7/1/21-6/30/23
11	Program Term		7/1/21-6/30/22	7/1/21-6/30/23
12	Expenditures			
13	Salaries & Benefits	\$66,950	\$66,950	\$133,900
14	Operating Expenses	\$0	\$0	\$0
15	Subtotal	\$66,950	\$66,950	\$133,900
16	Indirect Percentage (%)	0%	0%	0%
17	Indirect Cost (Line 16 X Line 15)	\$0	\$0	\$0
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$66,950	\$66,950	\$133,900
20	HSA Revenues			
21	General Fund	\$66,950	\$66,950	\$133,900
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$66,950	\$66,950	\$133,900
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$66,950	\$66,950	\$133,900
37	Full Time Equivalent (FTE)			
39	Prepared by:		Telephone No.:	
40	HSA-CO Review Signature: _____			
41	HSA #1			12/2/2020

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	COVIA Foundation							
4	Program: Volunteer Visitor Program							
5								
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11		7/1/21-6/30/22			7/1/21-6/30/23		7/1/21-6/30/23	
12		Agency Totals		HSA Program		DAS	DAS	TOTAL
	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Program Manager	\$65,960	1.00	100%	1.00	\$65,960	\$65,960	\$131,920
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28	TOTALS		1.00	100%	1.00	\$65,960	\$65,960	\$131,920
29								
30	FRINGE BENEFIT RATE	1.5%						
31	EMPLOYEE FRINGE BENEFITS					\$990	\$990	\$1,980
32								
33								
34	TOTAL SALARIES & BENEFITS	\$0				\$66,950	\$66,950	\$133,900
35	HSA #2							12/2/2020

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1	Appendix B, Page 3									
2										
3	COVIA Foundation									
4	Program: Volunteer Visitor Program									
5										
6										
7	Operating Expense Detail									
8										
9										
10										
11	TOTAL									
12	<u>Expenditure Category</u>			TERM	<u>7/1/21-6/30/22</u>		<u>7/1/21-6/30/23</u>			<u>7/1/21-6/30/23</u>
13	Rental of Property				_____		_____			\$ -
14	Utilities(Elec, Water, Gas, Phone, Garbage)				_____		_____			\$ -
15	Office Supplies, Postage				_____		_____			\$ -
16	Building Maintenance Supplies and Repair				_____		_____			\$ -
17	Printing and Reproduction				_____		_____			\$ -
18	Insurance				_____		_____			\$ -
19	Staff Training				_____		_____			\$ -
20	Staff Travel-(Local & Out of Town)				_____		_____			\$ -
21	Rental of Equipment				_____		_____			\$ -
22										
23	CONSULTANTS									
24										\$ -
25										
26										
27	OTHER									
28										\$ -
29										
30										
31	TOTAL OPERATING EXPENSE				\$ -		\$ -			\$ -
32										
33	HSA #3									12/2/2020

	A	B	C	D	E
1					Appendix B, Page 4
2					
3	COVIA Foundation				
4	Program: Volunteer Visitor Program				
5					
6					
7					
8	Subcontractor/Capital Expenditures				
9					
10	SUBCONTRACTORS		7/1/21-6/30/22	7/1/21-6/30/23	7/1/21-6/30/23
11	Subcontractor 1				
12	Subcontractor 2				
13					
14					
15					
16	TOTAL SUBCONTRACTOR COST		\$0	\$0	\$0
17					
18					
19	EQUIPMENT		7/1/21-6/30/22	7/1/21-6/30/23	7/1/21-6/30/23
20	Units	ITEM/DESCRIPTION			
21		Equipment A			
22					
23					
24					
25	TOTAL EQUIPMENT COST		\$0	\$0	\$0
26					
27	OTHER		7/1/21-6/30/22	7/1/21-6/30/23	7/1/21-6/30/23
28	Description:				
29	Remodel A				
30					
31					
32	TOTAL REMODELING COST		\$0	\$0	\$0
33					
34	TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE		\$0	\$0	\$0
35					
36	HSA #4				12/2/2020

	A	B	C	D
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Term	
6	Lighthouse for the Blind and Visually Impaired		7/1/21-6/30/23	
7	(Check One) New Renewal <input checked="" type="checkbox"/> Modification			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Volunteer Visitor Program			
10	Budget Reference Page No.(s)			7/1/21-6/30/23
11	Program Term		7/1/21-6/30/22	7/1/22-6/30/23
12	Expenditures			
13	Salaries & Benefits	\$18,823	\$18,823	\$37,646
14	Operating Expenses	\$600	\$600	\$1,200
15	Subtotal	\$19,423	\$19,423	\$38,846
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$2,914	\$2,914	\$5,828
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$22,337	\$22,337	\$44,674
20	HSA Revenues			
21	General Fund	\$22,337	\$22,337	\$44,674
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$22,337	\$22,337	\$44,674
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$22,337	\$22,337	\$44,674
37	Full Time Equivalent (FTE)			
39	Prepared by:		Telephone No.:	
40	HSA-CO Review Signature: _____			
41	HSA #1			12/2/2020

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1	Appendix B, Page 2							
2								
3	Lighthouse for the Blind and Visually Impaired							
4	Program: Volunteer Visitor Program							
5								
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11					7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23	
		Agency Totals		HSA Program		DAS	DAS	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Volunteer Engagement Spec.	\$67,156	1.00	18.29%	0.18	\$12,280	\$12,280	\$24,560
14	Sr. Director, Programs	\$170,280	1.00	2.00%	0.02	\$3,406	\$3,406	\$6,812
15								
16								
17								
18								
19								
20								
21	TOTALS	\$237,436	2.00	20%	0.20	\$15,686	\$15,686	\$31,372
22								
23	FRINGE BENEFIT RATE	20%						
24	EMPLOYEE FRINGE BENEFITS	\$47,487				\$3,137	\$3,137	\$6,274
25								
26								
27	TOTAL SALARIES & BENEFITS	\$284,923				\$18,823	\$18,823	\$37,646
28	HSA #2							12/2/2020

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1	Appendix B, Page 3									
2										
3	Lighthouse for the Blind and Visually Impaired									
4	Program: Volunteer Visitor Program									
5										
6										
7	Operating Expense Detail									
8										
9										
10										
11	TOTAL									
12	<u>Expenditure Category</u>			TERM	<u>7/1/21-6/30/22</u>		<u>7/1/22-6/30/23</u>			<u>7/1/21-6/30/23</u>
13	Rental of Property									\$ -
14	Utilities(Elec, Water, Gas, Phone, Garbage)									\$ -
15	Office Supplies, Postage									\$ -
16	Building Maintenance Supplies and Repair									\$ -
17	Printing and Reproduction									\$ -
18	Insurance									\$ -
19	Staff Training									\$ -
20	Staff Travel-(Local & Out of Town)									\$ -
21	Rental of Equipment									\$ -
22										
23	CONSULTANTS									
24										\$ -
25										
26										
27	OTHER									
28	<u>Volunteer Background Checks</u>				\$500		\$500			\$ 1,000
29	<u>Staff Transit</u>				\$100		\$100			\$ 200
30										
31	TOTAL OPERATING EXPENSE				\$ 600		\$ 600			\$ 1,200
32										
33	HSA #3									12/2/2020

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1					Appendix B, Page 4
2					
3		Lighthouse for the Blind and Visually Impaired			
4		Program: Volunteer Visitor Program			
5					
6					
7					
8		Subcontractor/Capital Expenditures			
9					
10		SUBCONTRACTORS	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
11		Subcontractor 1			
12		Subcontractor 2			
13					
14					
15					
16		TOTAL SUBCONTRACTOR COST	\$0	\$0	\$0
17					
18					
19		EQUIPMENT	TERM	7/1/21-6/30/22	7/1/22-6/30/23
20	Units	ITEM/DESCRIPTION			
21		Equipment A			
22					
23					
24					
25		TOTAL EQUIPMENT COST	\$0	\$0	\$0
26					
27		OTHER	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
28		Description:			
29		Remodel A			
30					
31					
32		TOTAL REMODELING COST	\$0	\$0	\$0
33					
34		TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE	\$0	\$0	\$0
35					
36		HSA #4			12/2/2020